

User Manual

Appointment System



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System Overview

The Appointment System enables the User to perform the following functions:

- New Patient Registration
- Retrieve User Name
- Retrieve Password
- Schedule Appointment
- Manage Appointment
- Cancel Appointment
- Profile Update
- Feedback

Menu Options

- Schedule Appointment
- Manage Appointment
- Profile Update
- Feedback

Application Access

1. Open the browser and enter the URL:

URL to Application

2. Press **Enter** or click **Go**

3. The login page of the application appears as in **Figure 1.1 Login Screen**

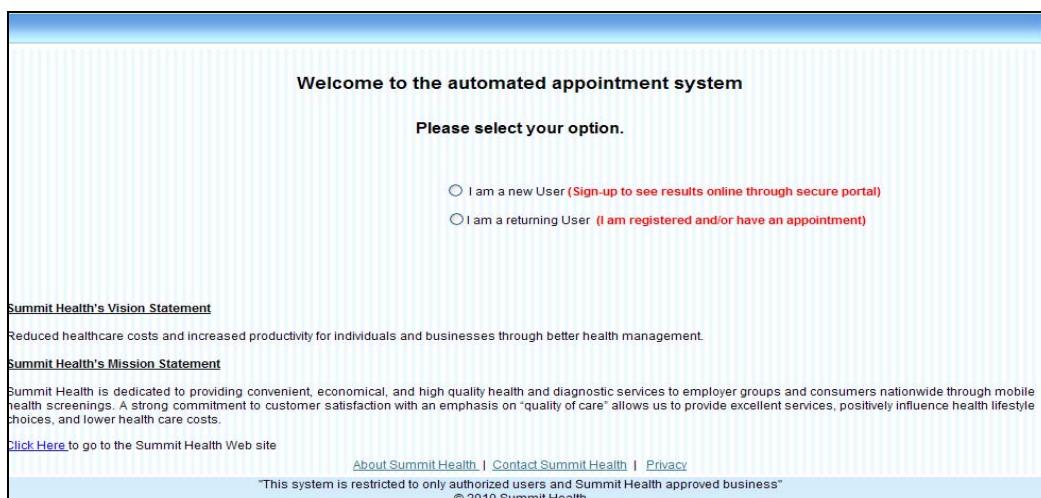


Figure 1.1: Login Screen

4. Login

- Click on **I am a Returning User** Radio button
- Enter the User Name in the **User Name** textbox
- Enter the Password in the **Password** textbox
- Click **SIGN IN**

5. Logout

- Click the **Sign Out** link on the top right hand corner of the browser (when logged in)

6. Forgot Password

- Click on the **Forgot Password** link
- Screen as in **Figure 1.2 Forgot Password** appears
- Click on **YES** button if the user is registered with an *Email ID*
- Click on **NO** or **Don't Know** button if the user is not registered with an Email ID. **Figure 1.4**
- When the user hit on **YES** button, this will ask the user to enter the **User Name** and **Email ID**.
- Screen as in **Figure 1.3 Send Password** appears.
- Click **Send Password**.
- A message **Your Password has been sent to your Email ID.** is displayed to confirm that the password has been emailed to the user's email id
- Click on **Cancel** to go back to login page and login with user name and password

Forgot Password

Fields marked with * are mandatory

Have you registered with an Email ID?

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Figure 1.2 Forgot Password

Forgot Password

Fields marked with * are mandatory

User Name *

Email ID *

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Figure 1.3 Send Password when user hit **YES** button on Figure 1.2

Forgot Password

Fields marked with * are mandatory

First Name *

Last Name *

User Name *

Security question *

Answer *

CREATE PASSWORD **BACK**

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Figure 1.4 Send Password when user hit **NO** or **Don't Know** button on Figure 1.2

- When the user selects the No or Don't Know option in the Forgot Password screen, they will get the option to enter the First Name, Last Name, User Name, Security Question and Answer.
- Click on **Create Password** button. This will create a password and a mail will be sent to the user.
- Click on **Back** button to go back to the login page.

7. Forgot User Name

- Click on **Forgot Username** link
- Screen as in **Figure 1.5 Forgot UserName** appears

Forgot UserName

Fields marked with * are mandatory
An email address is highly recommended, Without an email address you will not receive a reminder email

First Name *

Last Name *

Middle Initial

Email ID *

Security question *

Answer *

SEND USER NAME **CANCEL**

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Figure 1.5 Forgot User Name

- Fill in the details like First Name, Last Name, Middle Initial, Email ID, Security Question and Answer. Fill in all the mandatory fields marked with asterisk(*)
- Click on **Send User Name** button. This will mail the User Name to the user in their mail ID.

Patient Registration

1. Click **I am a new User** radio button on the login screen.
2. This will open the **Patient Registration - Contact Information** as shown in Figure 2.1

Patient Registration - Contact Information

Please provide the following information and click Register to continue
Fields marked with * are mandatory
Note : Creation of Username and Password will assist you in scheduling appointment, managing your appointment and to view your results online.

Company Name: Rajesh CLIENT
First Name: _____
MI: _____
Last Name: _____
Gender: _____
Email Address: _____
Confirm Email Address: _____
Phone: (____)-____-_____ Ext: _____

User Name*: _____
Password*: _____
Confirm Password*: _____
 Do you want to register your spouse?

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Figure 2.1 Patient Registration

3. Fill in the details in the fields marked with asterisk.
4. For the Email Address and Confirm Email Address, patient can't copy and paste the content either way.
5. If the user wishes to register for spouse, then he needs to click on **Do you want to register your spouse?** check box as shown in Figure 2.2. Feature to get the option for registering for spouse is set in PM level.

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Patient Registration - Contact Information

Please provide the following information and click Register to continue
Fields marked with * are mandatory
Note : Creation of Username and Password will assist you in scheduling appointment, managing your appointment and to view your results online.

Company Name: Rajesh Inc.
First Name: _____
MI: _____
Last Name: _____
Date Of Birth: _____
Email Address: _____
Confirm Email Address: _____

Sex: _____
SSN: _____
Employee ID: _____
Member ID: _____
Phone: (____)-____-_____

User Name*: _____
Password*: _____
Confirm Password*: _____

Do you want to register your spouse?
 Do you want to view your results online?

Spouse Information

First Name: _____	Sex: _____
MI: _____	SSN: _____
Last Name: _____	Employee ID: _____
Date Of Birth: _____	Member ID: _____
Email Address: _____	Phone: (____)-____-_____

Figure 2.2 Spouse Registration

- Click on **Register** button to get registered. This will take the user to **Manage Credential Screen** where the user will give the Security Question and Answer as seen in [Figure 2.3](#)

The screenshot shows a web-based application window titled "MANAGE CREDENTIALS". Inside, there are two input fields: "Security Question*" and "Security Answer*", both with dropdown arrows. Below these is a blue rectangular button labeled "UPDATE SECURITY QUESTION INFORMATION". At the very bottom of the page, a note reads "Fields marked with * are mandatory".

[Figure 2.3 Manage Credentials](#)

- Select the Security Question and answer and click on Update Security Question Information. This will take the user to Schedule Appointment Page.

Schedule Appointment

- After successful login the user will get the Schedule Appointment page as shown in [Figure 3.1](#)

The screenshot shows a web-based application window titled "Schedule Appointment". At the top, there's a navigation bar with links for "Appointment", "My Profile", and "Feedback". Below the navigation, a message says "Appointment >> Schedule Appointment". A note indicates "Fields marked with * are mandatory". The main content is divided into three steps: "Step 1 - Select Site" (with sub-points a, b, c), "Step 2 - Select Clinic" (with sub-points a, b, c), and "Step 3 - Select the action you want to perform" (with sub-points a, b, c). Below these steps are form fields: "Client Name*" (Rajesh CLIENT), "State*" (Michigan), "City*" (Southfield), and "Site*". At the bottom, there are three buttons: "CLICK TO SCHEDULE APPOINTMENT", "CLICK TO MANAGE APPOINTMENT", and "CLICK TO SHOW SITE MAP". A copyright notice at the bottom right reads "© 2010 Summit Health".

[Figure 3.1 Schedule Appointment](#)

2. The values for Client Name and Program will be grey out and fixed.
 3. Select the value for State from **State** dropdown menu.
 4. The corresponding value for City and Site will be populated. Select the value of City from **City** dropdown and for Site from **Site** dropdown menu as shown in [Figure 3.2](#)
 5. Here **Click to Manage Appointment** button will be disabled as there is no appointment in the name of this user to manage or reschedule.
- 10 . After selecting the **Site** the values for the **Clinics** available will be populated.

The screenshot shows a web-based application interface for scheduling an appointment. At the top, there's a blue header bar with tabs for 'Appointment' (selected), 'My Profile', and 'Feedback'. Below the header, the page title is 'Appointment >> Schedule Appointment'. A note says 'Fields marked with * are mandatory'. The main content area is titled 'Below are the steps to Schedule a Clinic' and lists three steps:

- Step 1 - Select Site**: Sub-points a, b, and c ask to select State, City, and Site respectively.
- Step 2 - Select Clinic**: Sub-point a asks to select a clinic.
- Step 3 - Select the action you want to perform**: Sub-points a, b, and c describe actions: 'To Schedule Appointment - Click on "Schedule Appointment" button.', 'View/Change Appointment - Click on "Manage Appointment" button.', and 'View MAP of Site - Click on "Show Site Map" button.'

The 'Select Site' section contains fields for 'Client Name*' (Rajesh CLIENT), 'Program*' (Immunizations), 'State*' (Michigan), 'City*' (Southfield), and 'Site*' (Rajesh CLIENT-3162 Ground Floor Southfield, MI-48034). Below this, the 'Select the Clinic' section shows 'Clinics Available' with three radio buttons corresponding to specific dates and times: 07/07/2010 9:00AM To 12:00PM, 07/17/2010 7:00AM To 9:00AM, and 07/30/2010 10:00AM To 12:00PM. At the bottom, there are three buttons: 'CLICK TO SCHEDULE APPOINTMENT', 'CLICK TO MANAGE APPOINTMENT' (disabled), and 'CLICK TO SHOW SITE MAP'.

[Figure 3.2 Lists of Clinics](#)

8. The list of **Clinic** associated with that particular Site will be populated with the radio button as shown in [Figure 3.2](#). This shows the list of clinics which are going to take place in the future. This does not show the expired clinics.
9. Select the value of Clinic by click on the radio button against the clinic.
10. Click on **Click To Schedule Appointment** button. This will open the Clinic Layout with the Appointments Available and color Legends to indicate **Available**, **Unavailable**, **Waitlist** and **Your Schedule Slot** as shown is [Figure 3.3](#)

Fields marked with * are mandatory
Below are the steps to Schedule a Clinic

Step 1 - Select Site
 a. Please Select the State.
 b. Please Select the City.
 c. Please Select the Site.

Step 2 - Select Clinic
 a. Select the Clinic (Multiple Clinics may be available at each site.)

Step 3 - Select the action you want to perform

a. To Schedule Appointment - Click on "Schedule Appointment" button.
 b. View/Change Appointment - Click on "Manage Appointment" button.
 c. View MAP of Site - Click on "Show Site Map" button.

Select Site

Client Name*	Rajesh CLIENT	State*	Michigan
Program*	Immunizations	City*	Southfield
Site*: Rajesh CLIENT-3162 Ground Floor Southfield, MI-48034			

Select the Clinic

Clinics Available

<input type="radio"/> 07/07/2010 9:00AM To 12:00PM	<input type="radio"/> 07/17/2010 7:00AM To 9:00AM	<input checked="" type="radio"/> 06/30/2010 10:00AM To 12:00PM
<input type="radio"/> 07/30/2010 10:00AM To 12:00PM		

Schedule Appointment

Schedule Appointment Slot For: Self

CLICK TO SCHEDULE APPOINTMENT **CLICK TO MANAGE APPOINTMENT** **CLICK TO SHOW SITE MAP**

To schedule an appointment click on the white area next to Appointment

Legend: Available Unavailable WaitList Your Scheduled Slot

Appointment Time Slot	Appointments	
0:00 AM To 10:30 AM	2/3 Appointments Available	Click here to schedule a time slot
0:30 AM To 11:00 AM	3/3 Appointments Available	Click here to schedule a time slot
1:00 AM To 11:30 AM	3/3 Appointments Available	Click here to schedule a time slot
1:30 AM To 12:00 PM	2/3 Appointments Available	Click here to schedule a time slot

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Figure 3.3 Appointments Available

11. Click on the space with text as "*Click here to schedule a time slot*" on the time slot as desired to schedule the appointment.
12. This will lead to Appointment Confirmation page with the set of Questions which are set in the Program Management level as shown in [Figure 3.4](#)

Appointment | My Profile | Feedback |

Appointment >> Appointment Confirmation

Company Name	Rajesh CLIENT	Employee Name	Ritwik Kumar
Site	L010511-3162 Ground Floor , S	Phone	
Program Title	Immunization	Email	rajesh.s@technosoftcorp.com
Clinic Type	Flu shot	Event Date	06/30/2010
		Appointment Start Time	10:00 AM

Consent Forms

[View Consent Forms](#)

How will you come for this appointment (Fasting Status) ?

Fasting
 Non Fasting
 Don't know

Outlook Calendar

Enable Microsoft Outlook meeting notice with Confirmation Mail

Special Requirement Question :

<input type="checkbox"/> Are you confined to a wheelchair?	<input type="checkbox"/> Are you hearing impaired?
<input type="checkbox"/> Are you visually impaired?	
<input type="checkbox"/> Does your height exceed 81 inches (6 feet 9 inches)?	

CONFIRM APPOINTMENT **PRINT** **EXIT** **CANCEL APPOINTMENT**

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Figure 3.4 Appointment Confirmation

13. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button.
14. This will confirm the appointment of the users on the desired slot and show the message as “Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: 07/30/2010, Appointment Start Time: 10:00 AM, Appointment End Time : 10:30 AM” as shown in [Figure 3.5](#). Here the user will receive the mail from Admin regarding his/her appointment confirmation.

The screenshot shows the 'Appointment Confirmation' page. At the top, there are navigation links: 'Appointment' (with a dropdown arrow), 'My Profile', and 'Feedback'. Below the header, the page title is 'Appointment >> Appointment Confirmation'. The main content area contains several input fields:

- Company Name:** Rajesh CLIENT
- Site:** 010511-3162 Ground Floor , S
- Program Title:** Immunization
- Clinic Type:** Flu shot
- Employee Name:** Ritwik Kumar
- Phone:** (This field is empty)
- Email:** rajesh.s@technosoftcorp.com
- Event Date:** 06/30/2010
- Appointment Start Time:** 10:00 AM

Consent Forms:

[View Consent Forms](#)

How will you come for this appointment (Fasting Status) ?

Fasting
 Non Fasting
 Don't know

Do not eat anything except water for atleast 9 hours before having your screening test. You are allowed to take your medicines with water the morning of the test.

Outlook Calendar:

Enable Microsoft Outlook meeting notice with Confirmation Mail

Special Requirement Question:

Are you confined to a wheelchair?
 Are you visually impaired?
 Does your height exceed 81 inches (6 feet 9 inches)?

Your appointment has been booked. A confirmation email has been sent to your email address.
 Your Appointment Date : 06/30/2010 , Appointment Start Time : 10:00 AM , Appointment End Time : 10:30 AM

[CONFIRM APPOINTMENT](#) [PRINT](#) [EXIT](#) [CANCEL APPOINTMENT](#)

Figure 3.5 Appointment Confirmation and mail sent

15. When the user clicks on **Cancel Appointment** button, this will take the user back to the Schedule Appointment page.
16. When the user hit on **Print** button, this will print the screen of the appointment scheduled.
17. Click on **Exit** button, this will make the user to logout of the application.

Manage Appointment

1. Select the **Manage Appointment** tab under **Appointment** menu as shown in [Figure 4.1](#)

The screenshot shows a web-based application interface for managing appointments. At the top, there's a navigation bar with links for 'Appointment', 'My Profile', and 'Feedback'. Below this, a sub-menu for 'Appointment' includes 'Schedule Appointment' and 'Manage Appointment'. The 'Manage Appointment' option is highlighted. A message states 'The mandatory fields are marked with *'. Below this, instructions for scheduling a clinic are provided in three steps: Step 1 - Select Site (with sub-points a, b, c), Step 2 - Select Clinic (with sub-points a, b, c), and Step 3 - Select the action you want to perform. A 'Select Site' section follows, containing fields for 'Client Name' (Rajesh CLIENT), 'Program' (Immunizations), 'State' (Michigan), 'City' (Southfield), and 'Site' (empty). At the bottom of this section are three buttons: 'CLICK TO SCHEDULE APPOINTMENT', 'CLICK TO MANAGE APPOINTMENT' (which is currently selected), and 'CLICK TO SHOW SITE MAP'. The footer of the page includes a copyright notice for '© 2010 Summit Health'.

[Figure 4.1 Manage Appointment](#)

2. Screen as in [Figure 4.2](#) appears displaying the current appointment

The screenshot shows the same web-based application interface as Figure 4.1, but now displaying a single appointment entry. The 'Manage Appointment' tab is selected. The 'Client Name' is listed as 'Rajesh Inc.' and the 'Program Type' is 'Immunization'. Below this, a table displays the appointment details:

Program Type	Program	State	City	Site	First Name	Last Name	Slot Type	Confirmed Appointment Time	WaitList Appointment Time
Immunization	Rajesh Inc. Immunization 03/19/2010 - 05/31/2010	Kentucky	Moorefield	Site for Rajesh Inc.	rajesh	sinha	Self	4/24/2010 9:00:00 AM CANCEL / RESCHEDULE	

At the bottom of the page, there are two notes: '* To cancel your appointment, please click 'Cancel'' and '* To reschedule your existing appointment, please click 'Reschedule''. The footer includes a copyright notice for '© 2010 Summit Health'.

[Figure 4.2 On selecting Manage Appointment](#)

3. Click on Reschedule button. This is show an alert message "Do you want to Reschedule this appointment?" as shown in [Figure 4.3](#)

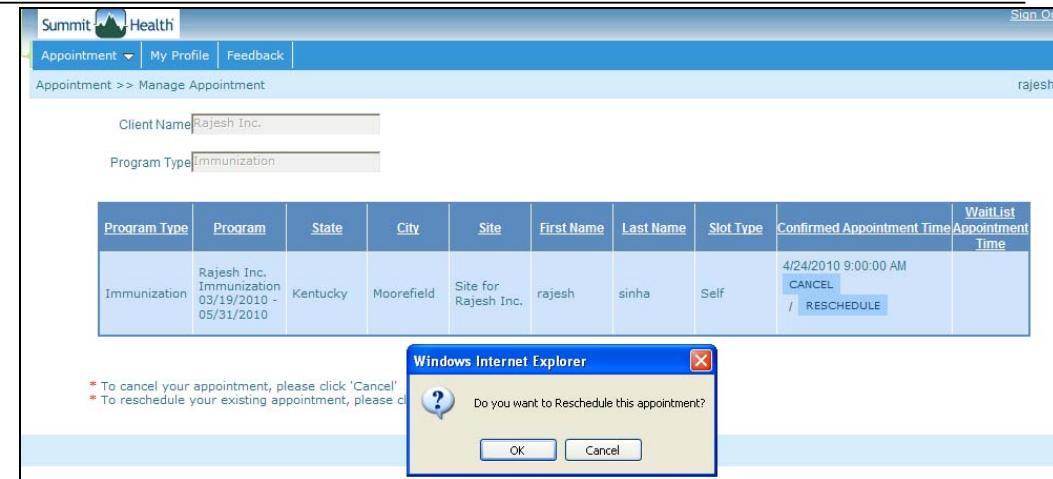


Figure 4.3 Alert Message

4. Click on ***Cancel*** button to remain on the same page.
5. Click on ***OK*** button, this will open the Reschedule Appointment page as shown in **Figure 4.4**. Here the user can **Reschedule** his/her appointment time for the same clinic based on the availability of the slots. The *green strip* shows user's already **Scheduled slot**. This also shows the number of appointments available out of total number of Appointment Available in a particular time slot.

This screenshot shows the 'Reschedule Appointment' page. It includes a legend at the top:

- Available
- Unavailable
- WaitList
- Your Scheduled Slot

 The page has sections for 'Select Site' (Client Name: Rajesh CLIENT, Program: Immunizations, State: Michigan, City: Southfield, Site: Rajesh CLIENT-3162 Ground Floor Southfield, MI-48034) and 'Select the Clinic' (Clinics Available: 07/07/2010 9:00AM To 12:00PM, 07/17/2010 7:00AM To 9:00AM, 07/30/2010 10:00AM To 12:00PM). The 'Action' section contains buttons for 'CLICK TO SCHEDULE APPOINTMENT', 'CLICK TO MANAGE APPOINTMENT', and 'CLICK TO SHOW SITE MAP'. A legend below these buttons indicates: To schedule an appointment click on the white area next to Appointment. The 'Appointment Start Time' is set to 06/30/2010 10:00 AM and the 'Appointment End Time' is 06/30/2010 12:00 PM. A table at the bottom shows appointment slots from 10:00 AM to 12:00 PM, with the 10:00 AM to 10:30 AM slot being 'Available' (green background) and labeled '1/3 Appointments Available'.

Figure 4.4 Reschedule Appointment

6. Click on the space with text as "Click here to schedule a time slot" on the time slot as desired to schedule the appointment. This shows the **Appointment Confirmation** page as shown in **Figure 4.5**.

The screenshot shows the 'Appointment Confirmation' page. At the top, there are tabs for 'Appointment', 'My Profile', and 'Feedback'. The user is signed in as 'ritwik'. The main content area displays the following information:

- Company Name:** Rajesh CLIENT
- Site:** L010511-3162 Ground Floor , S
- Program Title:** Immunization
- Clinic Type:** Flu shot
- Employee Name:** Ritwik Kumar
- Phone:** [redacted]
- Email:** rajesh.s@technosoftcorp.com
- Event Date:** 06/30/2010
- Appointment Start Time:** 10:30 AM

Consent Forms: A link to 'View Consent Forms' is present.

How will you come for this appointment (Fasting Status) ?

- Fasting
- Non Fasting
- Don't know

Do not eat anything except water for atleast 9 hours before having your screening test. You are allowed to take your medicines with water the morning of the test.

Outlook Calendar: A checkbox to 'Enable Microsoft Outlook meeting notice with Confirmation Mail' is checked.

Special Requirement Question:

- Are you confined to a wheelchair?
- Are you hearing impaired?
- Are you visually impaired?
- Does your height exceed 81 inches (6 feet 9 inches)?

At the bottom are four buttons: CONFIRM APPOINTMENT (highlighted in blue), PRINT, EXIT, and CANCEL APPOINTMENT.

Figure 4.5 Appointment Confirmation

7. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button. This will show the message as "Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: "Date", Appointment Start Time: "Time", Appointment End Time : "Time""
8. Click on **Cancel Appointment** button. This will navigate back to **Reschedule Appointment** page.
9. Reselect the desired slot, this will again take to Appointment Confirmation page.
10. Select the various questions and click on **Confirm Appointment** button.
11. When the user hit on **Print** button, this will print the screen of the appointment scheduled.
12. Click on **Exit** button, this will make the user to logout of the application.

Cancel Appointment

1. Select Manage Appointment from Appointment menu. This will show the Manage Appointment page as shown in [Figure 5.1](#)

Program Type	Program	State	City	Site	First Name	Last Name	Slot Type	Confirmed Appointment Time	WaitList Appointment Time
Immunization	Rajesh Inc. Immunization 03/19/2010 - 05/31/2010	Kentucky	Moorefield	Site for Rajesh Inc.	rajesh	sinha	Self	4/24/2010 9:00:00 AM	

* To cancel your appointment, please click 'Cancel'
* To reschedule your existing appointment, please click 'Reschedule'

Figure 5.1 On selecting Manage Appointment

2. Click on ***Cancel*** button. This will show the alert message as "***Do you want to cancel this appointment***" with ***Ok*** and ***Cancel*** button.
3. Click on ***Cancel*** button to keep the appointment as scheduled.
4. Click on ***Ok*** button.
5. This will cancel the appointment with the message as "***The Appointment is Successfully Canceled and email sent to the user.***" As shown in [Figure 5.2](#)

The Appointment is Sucessfully Canceled and email sent to the user.

Figure 5.2 Appointment Canceled

Profile Update

1. Click ***My Profile*** on menu
2. This will open the Profile Update page with ***Employee Details*** and ***Employee Password Details*** as headers as shown in [Figure 6.1](#)

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Appointment | My Profile | Feedback | Sign Out

Profile Update

rajeshs

Fields marked with * are mandatory

Employee Details

Client Name: Rajesh Inc.

User Name: rajeshs

First Name: * rajesh

Last Name: * sinha

Date Of Birth: * 07/17/1984

Email: rajesh.s@technosoftcorp.com

Phone:

UPDATE EMPLOYEE INFORMATION

Employee Password Details

Old Password: *

New Password: *

Confirm Password: *

CHANGE PASSWORD

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Figure 6.1 Profile Update

4. Edit the details like First Name, Last Name, Date Of Birth, Email ID and Phone.
5. Click on **Update Employee Information** button.
6. This will give the message as "**Updated Successfully.**" and will update the user's profile.
7. If the user wishes to change his/her password, in the **Employee Password Details**, fill in the values for **Old Password** then **New Password** and **Confirm Password**. Verify that the values are valid and matching else the system will throw the alert message.
8. Click on **Change Password** button.
9. This will show the message as "**Updated Successfully**" and the Password of the user will get changed as shown in [Figure 6.2](#)

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Appointment | My Profile | Feedback | Sign Out

Profile Update

Fields marked * are mandatory

Employee Details

Client Name: Rajesh Inc.

User Name: rajeshs

First Name: * rajesh

Last Name: * sinha

Date Of Birth: * 07/17/1984

Email: rajesh.s@technosoftcorp.com

Phone: [] []

Employee Password Details

Old Password *

New Password *

Confirm Password *

Updated Successfully

CHANGE PASSWORD

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Figure 6.2 Change Password

Feedback

1. Click on **Feedback** tab on the header.
2. This will open the Feedback page as shown in [Figure 7.1](#)

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Appointment | My Profile | Feedback | Sign Out

Clinic: [dropdown menu]

Type: [dropdown menu]

Enter your feedback here

Please select here if you would like a reply. (Note: Your Name, Phone Number and Email will be seen by the Recipient)

SEND FEEDBACK

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Figure 7.1 Feedback

3. Select the option for **Clinic** from **Clinic** dropdown menu.
4. Select either **Question** or **Feedback** from **Type** dropdown menu.
5. Fill in the comments in the "**Enter your feedback here**" section.
6. Check in the "**Please select here if you would like a reply**" if the user want the reply to the feedback.

7. Click on **Send Feedback** button.
8. This will send the feedback of the clinic to the Site Coordinator with the confirmation message as "**Your valuable feedback has been successfully sent.**" As shown in [Figure 7.2](#)

The screenshot shows a web-based feedback submission interface. At the top, there's a blue header bar with three tabs: "Appointment" (with a dropdown arrow), "My Profile", and "Feedback". The "Feedback" tab is active, indicated by a blue border. Below the header, the word "Feedback" is centered in a light blue box. A form area follows, containing two dropdown menus: "Clinic" set to "E0010511, 3162 Ground Floor, Southfield, Michigan, 48034" and "Type" set to "Question". Below these is a large text input field with the placeholder "Enter your feedback here" and a note "This is for User Manual, User Prospective". At the bottom of the form, there's a checkbox labeled "Please select here if you would like a reply. (Note: Your Name, Phone Number and Email will be seen by the Recipient)" followed by the confirmation message "Your valuable feedback has been successfully Sent." in green. A blue "SEND FEEDBACK" button is positioned just above a light blue footer bar that contains the copyright notice "© 2010 Summit Health".

[Figure 7.2 Feedback Sent](#)